

Project Management Planning

Introduction

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Planning is the Seed for Success

Without a project plan, project success will be difficult. Team members would have limited understanding of expectations, activities may not be properly defined, and resource requirements may not be completely understood. Even if the project is finished, no one has defined the conditions for success.

This section defines the elements of a project plan. As in all other parts of the Project Management Methodology, information contained in this section is intended as a starting point and has been kept to a general level to allow agencies to define their own requirements for project planning for specific projects.

The goal is to have basic elements, such as the following, defined for IT projects:

- Requirements
- Organization
- Statement of work and objectives
- Activity list and schedule
- Budget
- List of deliverables

The sub-sections of this project planning section provide a general overview of planning and focus specifically on each of the project plan elements. A section is also provided for discussing the project plan template that is provided in Appendix B: *Templates & Sample Forms*.

Responsibilities

The responsibilities for project planning are summarized below:

- Project Managers are responsible for developing a project plan for a specific project. The project manager is responsible for ensuring that the overall planning requirements are fulfilled.
- State organizations are responsible for developing internal procedures to ensure that the planning process is completed consistently with the state organization's business plan. IT projects must be well thought out, support the key stakeholder goals, and include documented processes that allow the project to be tracked and controlled until closure.
- Organization management is also responsible for ensuring that there are adequate resources assigned to managing a project. A separate management line item is recommended so that management costs are not rolled into overhead costs. Management is a full time job for most projects – it is not an activity well-suited to being performed in small part by many staff members.

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Terminology

As with all the sections of this methodology, a full glossary of terms is provided in *Glossary*; however, a sub-set of terms relative to this section includes:

Budget refers to an estimate of funds planned to cover a project or specified period of future time.

Project Plan is a management summary document that gives the essentials of a project in terms of its objectives, justification, and how the objectives are to be achieved. It describes how major activities of the project management function are to be accomplished, and describes methods of overall project control. The project plan evolves through successive stages of the project life cycle.

Configuration Management includes the processes, procedures, and tools to control project deliverable(s) in terms of release and revision and the system of procedures that monitors emerging project scope against the scope baseline. Documentation and management approval are required on any change to the baseline.

Activity is a task or series of tasks performed over a defined period of time.

Work Breakdown Structure is a product-oriented family tree division of hardware, software, services, and program-unique tasks that organize, define, and graphically display the work to be accomplished to achieve the specified product.

Stakeholders are individuals or organizational entities whose stake in the project is sufficient for them to play an influential role in effecting the outcome of the project.

Schedule is a display of time allocated to tasks.

Requirements are something essential to the existence or occurrence of something else.

Resource is something that lies ready for use or that can be drawn upon for aid or to take care of a need.

Resource Planning is the identification of components required to complete the project.

Risk is any factor that potentially affects the successful completion of a project..

Risk Management is the art and science of identifying, analyzing, and responding to risk factors throughout the life of a project.

Quality is a composite of attributes (including performance features and characteristics) of the product, process, or service required to satisfy the need for which the project is undertaken.